



Assets and Other Resources for Independent Students – 2017-2018

Student Name (Please print) _____

CSUID _____

- ✓ **Complete this form based on information as of the date you originally signed the Free Application for Federal Student Aid (FAFSA).**
- ✓ **If student/spouse have assets owned jointly with someone else (ex: business partner), report *only* your/your spouse’s portion of the net worth.**
- ✓ **All fields must have a value. Write “0” or “N/A” if none. (If no spouse, indicate N/A).**

STUDENT		SPOUSE
\$ _____	Cash, Savings, and Checking Accounts – Report total balance of cash, savings, and checking accounts	\$ _____
Real estate: <small>(Do not include the value of the primary home)</small> \$ _____ Rental property: \$ _____ Trust Funds: \$ _____ Stocks or bonds: \$ _____ Other investments: <small>(Please specify type)</small> _____ \$ _____ Total of student investments: \$ _____	Net worth of investments (Net worth = value - debt) <u>Investment value</u> = the market value of investments as of the date you signed the FAFSA and <u>Investment debt</u> = only those debts that are related to the investment(s). Do not include personal or consumer loans, or any debt not related to the investments <i>*See FAFSA Notes page 2</i>	Real estate: <small>(Do not include the value of the primary home)</small> \$ _____ Rental property: \$ _____ Trust Funds: \$ _____ Stocks or bonds: \$ _____ Other investments: <small>(Please specify type)</small> _____ \$ _____ Total of spouse investments: \$ _____

Business Value: \$ _____ Business Debt: \$ _____ Value – debt = Business equity: \$ _____ Name and type of business: _____ Total FT/FTE employees: _____	<p align="center">Net worth of business(es) owned</p> <p align="center">Do not include the value of a small business that has 100 or fewer full-time (FT) or full-time equivalent (FTE) employees</p> <p align="center"><i>*See FAFSA Notes page 2</i></p>	Business Value: \$ _____ Business Debt: \$ _____ Value – debt = Business equity: \$ _____ Name and type of business: _____ Total FT/FTE employees: _____
Farm Value: \$ _____ Farm Debt: \$ _____ Value – debt = Farm equity: \$ _____ Do you live on and operate the farm listed above? <input type="checkbox"/> Yes <input type="checkbox"/> No	<p align="center">Net worth of investment farm(s) owned</p> <p align="center">Do not include a farm that you live on and operate</p> <p align="center"><i>*See FAFSA Notes page 2</i></p>	Farm Value: \$ _____ Farm Debt: \$ _____ Value – debt = Farm equity: \$ _____ Do you live on and operate the farm listed above? <input type="checkbox"/> Yes <input type="checkbox"/> No
\$ _____	<p align="center">Housing, food, and other living allowances paid to member of the military, clergy, and others.</p>	\$ _____
\$ _____	<p align="center">Veterans non-education benefits</p>	\$ _____
\$ _____	<p align="center">Other untaxed income</p> <p>This includes workers' compensation, disability, untaxed portions of health savings accounts, etc.</p>	\$ _____
\$ _____ Name of person or source providing funds: _____ Relationship to student: _____	<p align="center">Money received, or paid on your behalf (e.g. bills), not reported elsewhere on this form.</p> <p>This includes money that you received from anyone not reported on the FAFSA, such as grandparents, aunts/uncles, or parent(s)</p>	\$ _____ Name of person or source providing funds: _____ Relationship to spouse: _____

All information provided on this form is complete and correct and every field has a value (**write in "0" if none**).

Student Signature _____

Date _____

Spouse Signature (if applicable) _____

Date _____